



Homeless Prevention Services [HPS] Workflow

2022



Overview - *What Today's Training Will Cover*

- Introductions
- Client Entry Refresher
- Reviewing the Release of Information (ROI)
- Entering Case Notes - *Clients Not Enrolled in Program*
- Household Configuration
- Administering and Entering the HPAT Assessment
- Enrolling Household in Program
- Providing Services
- Administering and Entering the Status Update
- Exiting Household
- Live Demonstration
- Q&A

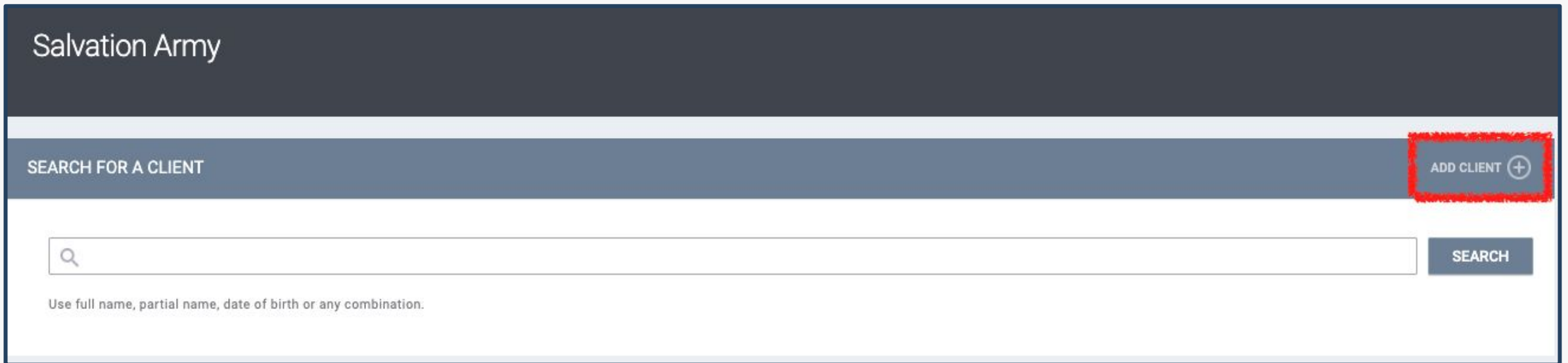




CLIENT ENTRY REFRESHER

Client Entry Refresher - How Do I Create a New Client Record?

1. Log into HMIS
2. Search for Client in the search bar to determine they do not already have a profile in HMIS
3. If you determine the client does not exist in HMIS, proceed to ADD CLIENT from the search tab
4. Mouse over and click on the **ADD CLIENT** to begin entry



Salvation Army

SEARCH FOR A CLIENT

ADD CLIENT (+)

SEARCH

Use full name, partial name, date of birth or any combination.

Client Entry Refresher - How Do I Create a New Client Record?

From the **CREATE A NEW CLIENT** page you will record core data about the client. Certain fields are required before you can save a record. A banner will appear to indicate the record cannot be saved.

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Select

Last Name

First Name

Quality of Name

Select

Quality of DOB

Select

Date of Birth

Middle Name

Suffix

None

Alias

Gender

Select

Race

Select

Ethnicity

Select

Client is Deceased

☐

Please fill in Release of Information form

CANCEL

Please correct errors.

CREATE A NEW CLIENT

Social Security Number

To add a client photo to the client record, hover over the default Client Profile image and click **UPDATE PROFILE PHOTO**.

A screenshot of the client profile photo update interface. It features a placeholder image of a person's head and shoulders. Above the image is a button labeled 'UPDATE PROFILE PHOTO' with a camera icon. Below the image, the text 'UNIQUE IDENTIFIER' is displayed above the value 'E2EF6116C', which is followed by an information icon.

Bitfocus

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Reviewing the Release of Information (ROI)

Reviewing the Release of Information - ROI Overview

No client information may be added or updated in HMIS until a client signs a valid consent form and uploaded to the system.

- A signed release of information must be uploaded for every member of the household.
- Each client consent must set a specific expiration date in order for the ROI to be valid.
- Clients must initial the boxes in the left-hand column of the ROI to give consent for collecting and sharing of each type of HIPAA-protected information listed in the right-hand column of the ROI.



Reviewing the Release of Information - ROI Overview

- After creating a new client you will be required to upload the ROI; without it you will not be able to save the record.
- If it is an existing client you should review what the client has consented to by reviewing the uploaded ROI file.
- Please note you will need to enter a start and end date for the ROI

Salvation Army

Lealy Soto Bright, Salvation Army

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SEARCH CASELOAD

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Last Name

First Name

Quality of Name

Quality of DOB

Date of Birth

Middle Name

Alias

Gender

Race

Ethnicity

Client is Deceased

Please fill in Release of Information form

CANCEL

RELEASE OF INFORMATION

Permission

Start Date

End Date

Documentation

Yes

01/11/2022

01/11/2025

Select

Adding an ROI to a new client



RELEASE OF INFORMATION					ADD RELEASE OF INFORMATION +
Permission	Type	Start Date	End Date	Version	
Yes County: OSH CA-500	Attached PDF	11/09/2021	11/09/2024	V.2	

Reviewing ROI for existing client

Reviewing the Release of Information - ROI Overview

Client initials	Type of PPI/PHI
1	• Identifying information (including: name, birth date, gender, race, ethnicity, social security number, phone number, residence address, or other similar identifying information)
2	• My photograph or other likeness
3	• Medical information included in my responses to questions asked as part of the standard HMIS intake and identification as a client or patient of the Santa Clara Valley Health and Hospital System
4	• HIV/AIDS-related information included in my responses to questions asked as part of the standard HMIS intake
5	• Mental health information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving mental health services from the County's Behavioral Health Services Department
6	• Substance abuse treatment information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving substance abuse or alcohol treatment from the County's Behavioral Health Services Department
7	• Financial and benefits information (including: employment status, income verification, public assistance payments or allowances, food stamp allotments, health care coverage, or other similar financial or benefits information)
8	• Housing information
9	• Information about services provided by HMIS Partner Agencies (including: date, duration, and type of service; and other similar service information)
10	• Other (specify): _____

If a client does not initial the following boxes the information cannot be entered into HMIS:

- #1 (identifying information) create an anonymous profile
- #3, 5, 6, 7, or 8 respectively impacts the information entered in HMIS related to the assessment.
 - This may impact their scoring in HMIS.
 - Switch to paper HPAT and enter **Eligibility Exception Service** to record correct score.
- #9 impacts the service transactions (Ex: United way Seasons of Sharing,) we can record for the household
- #2, 4 or 10 does not impact the information entered for HP or assessment score.

*****Refusal to have data entered into HMIS will not affect the client's eligibility for benefits or services, or ability to obtain treatment or payment.***



Entering Case Notes
Client Not Enrolled in Program

Entering Case Notes - *For clients not enrolled in program*

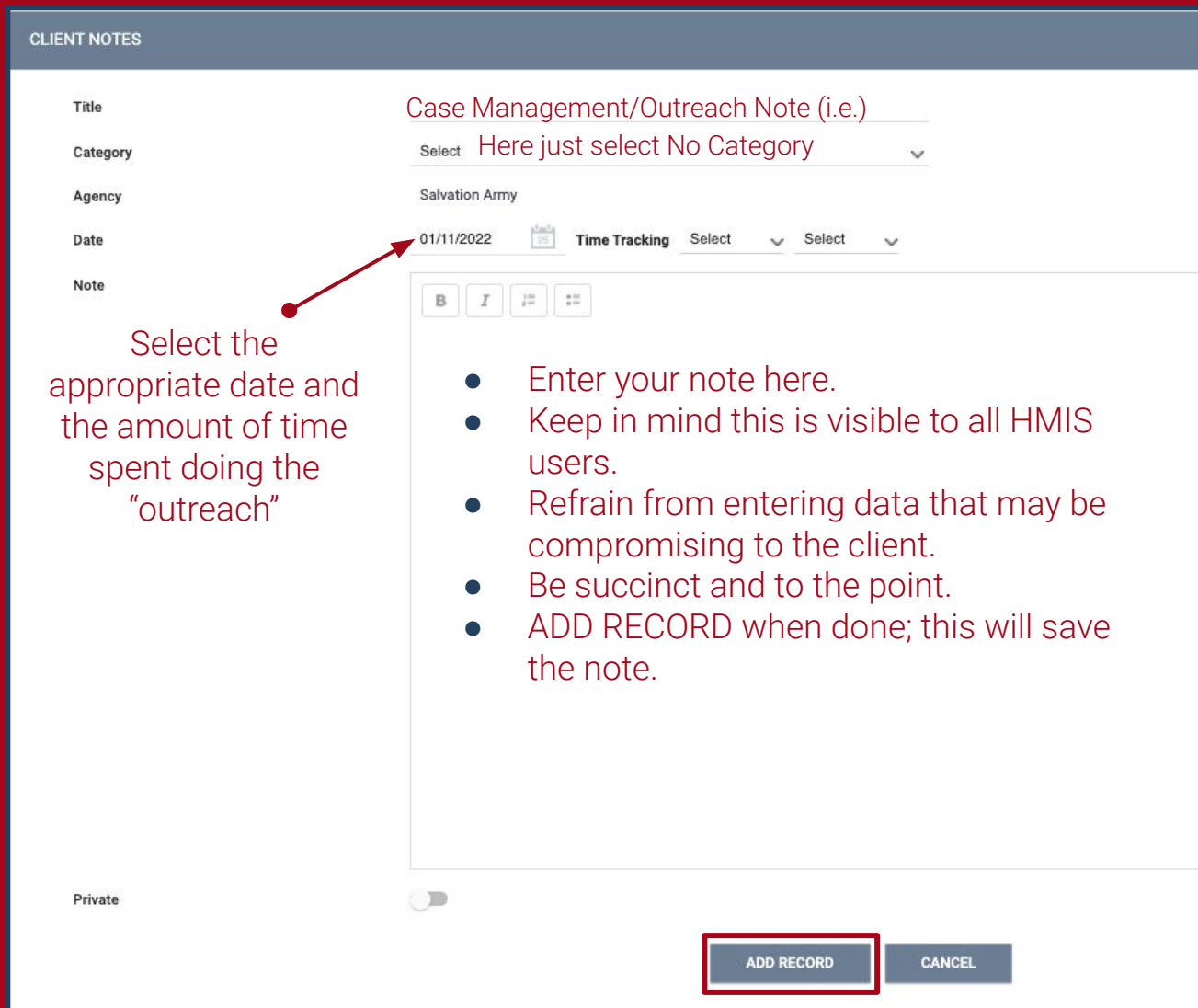
Have clients that you have completed outreach for, but will not enroll into program? Here is what you can do:

- Use **NOTES** section in HMIS to enter information about a client who you will not enroll into program
- Search for the client
- At the agency level select the **NOTES** Tab (you will be redirected to a different screen)
- Use the plus symbol to **ADD NOTE**

The screenshot displays the 'Wonder Woman' HMIS interface. At the top, a dark navigation bar contains the title 'Wonder Woman' and a series of tabs: PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, **NOTES** (highlighted with a red box), FILES, CONTACT, and LOCATION. Below this, a light blue header bar reads 'CLIENT NOTES' on the left and features an 'ADD NOTE (+)' button (also highlighted with a red box) on the right. The main content area is a table with the following data:

Title	Category	User Full Name	Date	
test County: OSH	No Category	Elisha Heruty	11/09/2021	

Entering Case Notes - *For clients not enrolled in program*



CLIENT NOTES

Title Case Management/Outreach Note (i.e.)

Category Select Here just select No Category

Agency Salvation Army

Date 01/11/2022 Time Tracking Select Select

Note

Select the appropriate date and the amount of time spent doing the "outreach"

- Enter your note here.
- Keep in mind this is visible to all HMIS users.
- Refrain from entering data that may be compromising to the client.
- Be succinct and to the point.
- ADD RECORD when done; this will save the note.

Private

ADD RECORD CANCEL

This is an example, you can entitle the notes whatever is most appropriate and reflects the task completed. For example Phone Call, Home Visit, Referral etc.

This will allow you to track services provided prior to enrolling the client into the program.

**This note only applies to the client selected; have other clients within the household? Add a note by going to the individual client profile.*




Household Configuration




Household Configuration - Create & Manage Members

- By default, a newly created client record will not be associated with a Household.
- When you are on any tab within a client record, you will see the **Household Members** section at the top of the right sidebar.
- This section will list any active Household members associated with the client record. To manage the Household members, click the Manage button.

CLIENT PROFILE

Social Security Number	XXX - XX - 0101
Quality of SSN	Approximate or partial SSN reported
Last Name	Woman
First Name	Wonder
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	12/4/1968





Household Members

Manage

No active members

Active Programs

[HPS - DH] Salvation Army Prevention P...

[CE] County: SCVHHS - Ambulatory

Household Configuration - Create & Manage Members

- Selecting the *Manage* icon/link at the top of the right sidebar will take you to the Household Management search screen.
- At this point if you recently entered the clients into HMIS you will see them in the **YOUR RECENT CLIENT SEARCHES ACCESSED**.
- You can select them from there - or if you do not see them, you can **SEARCH FOR A HOUSEHOLD MEMBER**.
- Using the plus sign that appears next to the name will allow you to add the client as a Household Member.

Wonder Woman

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

HOUSEHOLD MANAGEMENT

Search for a Household Member

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Household History

Household Members

No active members

Your recent client searches accessed

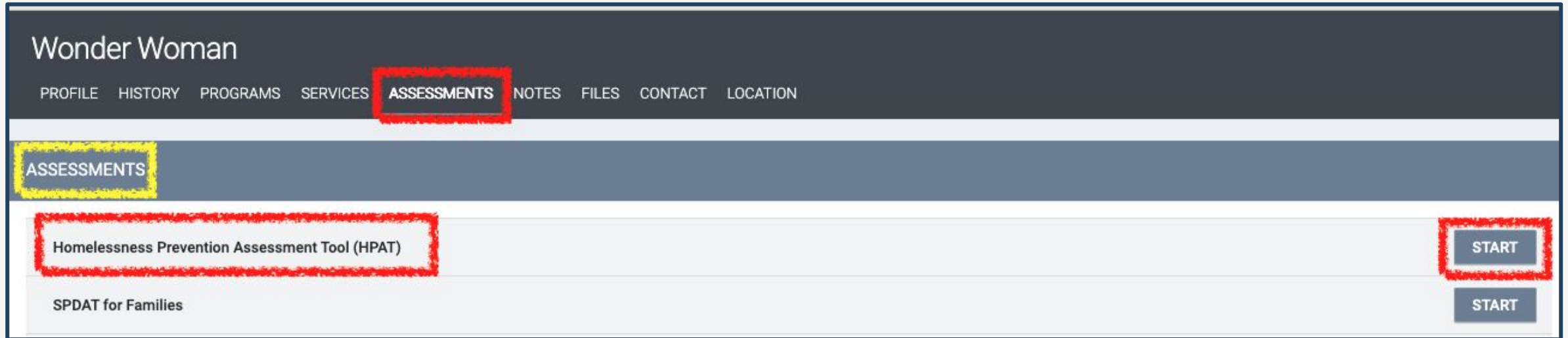
Panda Bear	5908	+
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Administering & Entering the HPAT Assessment

Administering & Entering the HPAT Assessment

The Homeless Prevention Assessment Tool (HPAT) is located in the **ASSESSMENTS Tab** at the Agency Level



- The HPAT assessment can only be administered by End Users that have completed the required training
- HPAT has replaced the PR-VI-SPDAT
- There is only one HPAT; unlike the PR-VI-SPDAT there is no single or family
- Resources for the HPAT can be found [here](#)

Administering & Entering the HPAT Assessment

- Select **START** when ready to proceed with administering the HPAT
- Please be sure to enter a response for each question
- Please note you will need to enter the Name and Phone Number of Staff Completing the HPAT
 - *At some agencies data entry is completed by a different staff person; please ensure the name of the person who provided the HPAT is listed.*
- When done select **SAVE**

The screenshot shows the 'Wonder Woman' web application interface for the 'HOMELESSNESS PREVENTION ASSESSMENT TOOL (HPAT)'. The top navigation bar includes links for PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS (which is highlighted), NOTES, FILES, CONTACT, and LOCATION. The main content area is titled 'HOMELESSNESS PREVENTION ASSESSMENT TOOL (HPAT)'. A red rectangular box highlights the 'Assessment Date' field, which is set to '01/11/2022'. Below this, the form is divided into several sections, each with a heading and a list of questions, each followed by a 'Select' dropdown menu. The sections are: 'HOUSEHOLD COMPOSITION: I WANT TO START BY ASKING YOU ABOUT YOUR HOUSEHOLD.' (Question 1), 'CURRENT FINANCIAL SITUATION: NOW I'D LIKE TO BETTER UNDERSTAND YOUR FINANCIAL SITUATION.' (Questions 2, 3, 4), 'CURRENT HEALTH: NOW I WILL ASK YOU QUESTIONS ABOUT YOUR HEALTH.' (Questions 5, 6, 7), and 'HOUSING HISTORY & OTHER FACTORS: NOW LET'S EXAMINE SOME OF THE OTHER LIFE AREAS THAT MIGHT AFFECT YOUR HOUSING STABILITY.' (Questions 8, 9).



Enrolling Household in Program

Enrolling Household in [HPS] Program

Panda Bear

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

[HPS - DH] Salvation Army Prevention Program

Active Clients

1 CLIENT

0 % Families
100 % Individuals

Funding Source
Local or Other Funding Source

Availability
Full Availability

Service Categories:

- ✓ No Category
- ✓ Case Management
- ✓ Transportation
- ✓ Employment
- ✓ Mental Health
- ✓ Legal Services
- ✓ Financial
- ✓ Health Care
- ✓ Food

Include group members:
☒ Wonder Woman

PRINT DIRECTIONS DOC REQUIREMENTS

ENROLL

If you are accepting the household into your program, complete the enrollment screen for each household member in HMIS

- From the head of household's profile screen click on the **PROGRAMS** tab
- Choose the **[HPS-DH] Salvation Army Prevention Program** or appropriate prevention program
- Click the toggle to **Include group members** (household members)
- Click **ENROLL** and complete the intake information for each member of the household

Enrolling Household in [HPS] Program

Wonder Woman

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

PROGRAMS: AVAILABLE

Vehicle Outreach Program

[CE] Community Services Agency of Mountain View

[HPS - DH] CSA Prevention Program

[HPS - DH] Emergency CSA

[HPS - OSH] CSA Prevention Program

Funding Source
Local or Other Funding Source

Availability
Full Availability

Service Categories:

- ✓ No Category
- ✓ Employment
- ✓ Financial
- ✓ Case Management
- ✓ Mental Health
- ✓ Health Care
- ✓ Transportation
- ✓ Legal Services
- ✓ Food

Include group members:

☒ Panda Bear

PRINT DIRECTIONS DOC REQUIREMENTS

ENROLL

If you are accepting the household into your program, complete the enrollment screen for each household member in HMIS

From the head of household's profile screen click on the **PROGRAMS** tab

Choose the **[HPS-OSH] CSA Prevention Program** or appropriate prevention program

Click the toggle to **Include group members** (household members)

Click **ENROLL** and complete the intake information for each member of the household

Enrolling Household in [HP] Program

Additional Notes regarding program enrollment:

Project Start Date = *the date the client was approved for enrollment*

** For some agencies it might be the date the case was approved before receiving either case management or financial assistance. If unsure, ask your manager about the location of the approval date in the file.*





Providing Services (at the program level)

Providing Services within [HPS] Program Enrollment

- Once the client is enrolled in the appropriate program add services under **PROVIDE SERVICES** TAB
- A list of services will appear
- Select the appropriate service

PROGRAM: [HPS - DH] SALVATION ARMY PREVENTION PROGRAM

Enrollment History **Provide Services** Assessments Notes Files ✕ Exit

Services

Assistance with Public Benefits	No Category ▾
Case Management	Case Management ▾
Clothing	No Category ▾
Credit Counseling	Financial ▾
Education: Financial	Financial ▾
Employment Assistance	Employment ▾
Food Pantry	Food ▾
Gift Cards	No Category ▾
Holiday Programs	No Category ▾
Household Supplies	No Category ▾
ID Vouchers	No Category ▾
Meals	Food ▾
Other Non-Financial Service	No Category ▾
Referral to Dental Services	Health Care ▾
Referral to Legal Services	Legal Services ▾
Referral to Medical Services	Health Care ▾
Referral to Mental Health Services	Mental Health ▾

School Supplies	No Category ▾
Transportation Assistance (Non-Financial)	Transportation ▾
[HP Financial] Destination: Home (DH)	Financial ▾
[HP Financial] Housing Industry Foundation (HIF)	Financial ▾
[HP Financial] Housing Trust	Financial ▾
[HP Financial] Other Funding Source	Financial ▾
[HP Financial] REACH	Financial ▾
[HP Financial] Sacred Heart	Financial ▾
[HP Financial] Seasons of Sharing (SoS)	Financial ▾
[HP Financial] United Way EAN	Financial ▾
[HP Financial] United Way Measure A	Financial ▾
[HPS-DH] Coronavirus Impacts	Financial ▾
[HP] Eligibility Exception	No Category ▾

Providing Services within [HPS] Program Enrollment

- Once the client is enrolled in the appropriate program add services under **PROVIDE SERVICES** TAB
- A list of services will appear
- Select the appropriate service

PROGRAM: [HPS - OSH] LIFEMOVES OSC PREVENTION PROGRAM

Enrollment History **Provide Services** Assessments Notes Files ✕ Exit

Services

Assistance with Public Benefits	No Category ▾
Case Management	Case Management ▾
Clothing	No Category ▾
Credit Counseling	Financial ▾
Education: Financial	Financial ▾
Employment Assistance	Employment ▾
Food Pantry	Food ▾
Gift Cards	No Category ▾
Holiday Programs	No Category ▾
Household Supplies	No Category ▾
ID Vouchers	No Category ▾
Meals	Food ▾
Other Non-Financial Service	No Category ▾
Referral to Dental Services	Health Care ▾
Referral to Legal Services	Legal Services ▾
Referral to Medical Services	Health Care ▾
Referral to Mental Health Services	Mental Health ▾
School Supplies	No Category ▾

Transportation Assistance (Non-Financial)	Transportation ▾
[HP Financial] Housing Industry Foundation (HIF)	Financial ▾
[HP Financial] Housing Trust	Financial ▾
[HP Financial] Office of Supportive Housing (OSH)	Financial ▾
[HP Financial] Other Funding Source	Financial ▾
[HP Financial] Sacred Heart	Financial ▾
[HP Financial] Safety Net	Financial ▾
[HP Financial] Seasons of Sharing (SoS)	Financial ▾
[HP Financial] United Way	Financial ▾
[HPS-DH] Coronavirus Impacts	Financial ▾

Providing Services within [HPS] Program Enrollment

Provide financial or non-financial services

1. Select the Service and enter related information
2. **Enter financial services under the head of household only:**
 - a. Choose funding source (e.g. Destination: Home, SoS, HIF)
 - b. Choose type of assistance (e.g. Rental Assistance, Security Deposit)
 - c. Fill out Start Date, End Date, and Expense Date as the date listed on the check
 - d. Fill out Expense Amount
 - e. If an “Other” funding source or type of assistance was provided, specify what type in the Notes section

[HP Financial] Destination: Home (DH) Financial

- Motel
- Other (Specify in Notes)
- Rental Assistance
- Security Deposit
- Transportation
- Transportation services: tokens/vouchers
- Transportation services: vehicle repair/maintenance
- Utility Deposit
- Utility Fee Payment

Rental Assistance

Start Date: 01/11/2022 End Date: 01/11/2022

Expense Amount: 0.00 Expense Date: 01/11/2022

Funding Source: No Funding Source

Service Note :

B I

SUBMIT

Providing Services within [HPS] Program Enrollment

Provide financial or non-financial services

1. Select the Service and enter related information
2. **Enter financial services under the head of household only:**
 - a. Choose funding source (e.g. Destination: Home, SoS, HIF)
 - b. Choose type of assistance (e.g. Rental Assistance, Security Deposit)
 - c. Fill out Start Date, End Date, and Expense Date as the date listed on the check
 - d. Fill out Expense Amount
 - e. If an “Other” funding source or type of assistance was provided, specify what type in the Notes section

This screenshot shows the service selection interface for the [HP Financial] Office of Supportive Housing (OSH). A red box highlights the header "[HP Financial] Office of Supportive Housing (OSH)". A yellow box highlights a list of service options: Motel, Other (Specify in Notes), Rental Assistance, Security Deposit, Transportation services: tokens/vouchers, Transportation services: vehicle repair/maintenance, Utility Deposit, and Utility Fee Payment. Each option has a dropdown arrow to its right. The word "Financial" is visible in the top right corner.

This screenshot shows the "Rental Assistance" service entry form. A red box highlights the "Rental Assistance" title. The form includes fields for Start Date (07/15/2022), End Date (07/15/2022), Expense Amount (0.00), and Expense Date (07/15/2022). A yellow box highlights the "Funding Source" dropdown menu, which is currently set to "Office of Supportive Housing (OSH)". Below this is a "Service Note" section with a text area and formatting buttons (B, I, U, and a list icon). A "SUBMIT" button is located at the bottom right. A green circular arrow icon is in the top right corner.



Administering & Entering the Status Update

Administering & Entering the Status Update

How Do I conduct a Status Assessment?

If the household's or client's status has changed (e.g. household becomes homeless, income or benefits change), record the change in HMIS:

1. Create **Status Update Assessment** for each member affected
 - a. This is located under the program enrollment in the **Assessments Tab**
2. If household loses housing, change Housing Status and update Current Residence to match the new living situation
3. Record any changes to income, benefits, health insurance, disabling conditions

The screenshot displays the 'Wonder Woman' HMIS interface. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS' (highlighted with a red box), 'SERVICES', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', and 'LOCATION'. Below this, a blue bar indicates the 'PROGRAM: [HPS - DH] SALVATION ARMY PREVENTION PROGRAM' (also highlighted with a red box). The main content area has tabs for 'Enrollment', 'History', 'Assessments' (selected), 'Notes', and 'Files', with an 'Exit' button. Under the 'Assessments' tab, there is a section titled 'Assessments' with a 'LINK FROM ASSESSMENTS' option. Two assessment options are listed: 'Status Update Assessment' and 'Annual Assessment', each with a 'START' button. The 'Status Update Assessment' row is highlighted with a yellow box.



Exiting Household (from program)

Exiting Household- How Do I Exit a Client from a Program?

When the household leaves, exit them from the program in HMIS:

1. Fill out household's exit destination
 - a. Project Exit Date
 - The date a client last receives financial services or the date a client meets with a case manager to agree to end services. Whichever date is the latest.
 - If the client loses touch with the case manager, end date should be last date of communication with the client or the last financial service recorded. Whichever date is the latest.
 - b. Destination- reported by client during exit interview or information reported during the last contact with the client.
 - c. Housing Assessment at Exit - asks if household maintained the same rental unit as they started with, or if they moved out
 - d. Subsidy Information - if exiting to a rental unit, specify if it has an ongoing subsidy
2. Review the other exit questions and update with any changes

Exiting Household- How Do I Exit a Client from a Program?

The screenshot shows the 'Wonder Woman' program interface. The 'PROGRAMS' tab is selected in the top navigation bar. Below it, the program name 'PROGRAM: [HPS - DH] SALVATION ARMY PREVENTION PROGRAM' is displayed. A red box highlights the 'Exit' button in the top right corner. The main form is titled 'End Program for client Wonder Woman'. It contains several sections: 'Program Exit Date' (01/11/2022), 'Zip Code of Current Address' (95020), 'Destination' (Select), 'Housing Assessment at Exit' (Select), 'Did the client stay in the same rental unit at exit (transition in place)?' (toggle switch), 'EDUCATION' (Last Grade Completed: Some college, Currently Attending College/University: Not Currently Attending), 'ADDITIONAL HOMELESS PREVENTION INFORMATION' (What is your current monthly rent?: 1200, Are you doubled-up, meaning there is more than one household/family living in a single family unit?: No), and 'DISABLING CONDITIONS AND BARRIERS' (Physical Disability: No, Developmental Disability: No, Chronic Health Condition: No, HIV - AIDS: No, Mental Health Disorder: No).

Exiting a Household

- When exiting a household, the option to exit several household members will appear.
- Toggle the switch next to the member(s) you wish to exit.
- You can select all clients to be exited from the enrollment, or a smaller subset.
- Once you click the **END PROGRAM** button, the exit screens for the clients you selected will be displayed in sequence for each household member.

The screenshot shows a dialog box titled 'SELECT CLIENTS TO EXIT FROM PROGRAM'. It contains a list of clients with toggle switches and a status column. The clients are Jane Doe and John Doe, both with their status set to 'Not Set'. At the bottom of the dialog is a button labeled 'END PROGRAM'.

Client	Status
Jane Doe	Not Set
John Doe	Not Set

END PROGRAM

Exiting Household- How Do I Exit a Client from a Program?

Test Client Bitfocus

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

PROGRAM: [HPS - OSH] LIFEMOVES OSC PREVENTION PROGRAM

Enrollment History Provide Services Assessments Notes Files **X Exit**

End Program for client Test Client Bitfocus

Program Exit Date	07/15/2022
Zip Code of Current Address	95131
Destination	Select
Housing Assessment at Exit	Select
Did the client stay in the same rental unit at exit (transition in place)?	<input type="checkbox"/>

EDUCATION

Last Grade Completed	Some college
Currently Attending College/University	Not Currently Attending

ADDITIONAL HOMELESS PREVENTION INFORMATION

What is your current monthly rent?	1200
Are you doubled-up, meaning there is more than one household/family living in a single family unit?	No

DISABLING CONDITIONS AND BARRIERS

Exiting a Household

- When exiting a household, the option to exit several household members will appear.
- Toggle the switch next to the member(s) you wish to exit.
- You can select all clients to be exited from the enrollment, or a smaller subset.
- Once you click the **END PROGRAM** button, the exit screens for the clients you selected will be displayed in sequence for each household member.

SELECT CLIENTS TO EXIT FROM PROGRAM


<input checked="" type="checkbox"/>	Jane Doe	Not Set
<input type="checkbox"/>	John Doe	Not Set

END PROGRAM



Live Demonstration


Live Demonstration...SCC HMIS Training Site



CLARITY
HUMAN SERVICES

Username

Password

 **SIGN IN**

[FORGOT PASSWORD?](#)

Questions, Comments, Concerns?

Please contact the Help Desk:
sccsupport@bitfocus.com

Want to practice entering this workflow before moving to the live site?

Test your skills on the [SCC Training Site](#)

Need HMIS HPS Forms check them out [here!](#)



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